Course Syllabus
FIR 1220 Personal Financial Planning
Fall 2018
3.0 Credit Hours

Instructor: Mr. Leslie Mathis, MS, CFA
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Office: FAB 446
Office Hours: Monday, Wednesday, and Friday 9:00 am-10:00 am
Class Times & Location: Monday, Wednesday, and Friday 10:20 am-11:15 am in FCB 259

Course Overview:

Non-technical course covering areas of personal budgeting, credit, insurance, home ownership, investments, taxes, and the financial planning process.

Pre-Requisites:
None

Required Texts (and Related Materials):
PFIN6 by Billingsley, Gitman, & Joehnk

Fogelman College: Learning Outcomes for Your BBA Degree

Goal 1: Graduates will be effective communicators.

Goal 2: Graduates will demonstrate critical thinking skills.

Goal 3: Graduates will be knowledgeable about ethical factors in the business environment.

Goal 4: Graduates will be knowledgeable about the global business environment.

Goal 5: Graduates will be proficient users of business presentation and analysis technology.
Course Methodology

Grading and Evaluation Criteria

There will be 3 exams in the course. Each exam will include multiple choice questions and possibly problems. Each exam will be equally weighted (one third of the overall grade).

Final Course Grades

I do not plan to use plus or minus grades for the overall grade. The final grading scale will be as follows:

90 and above = A
80-89 = B
65-79 = C
55-64 = D
Below 55 = F

Final Exam Schedule

The final exam for this class will be on Monday, December 10 at 10 am in the regular classroom.

Course Policies:

E-MAIL:

All students are required to maintain and access their University of Memphis (@memphis.edu) email account. You will receive all official course correspondence at this email account. Any inability to receive incoming mail in a timely fashion (e.g., not regularly checking your email, having a “full mailbox” condition, etc.) is the student’s responsibility.

Attendance:

Students are highly encouraged to attend all classes. Poor attendance is usually correlated with low grades. Students are responsible for material covered in class even if they were unable to attend. Make sure that you get notes from another student if you are absent.

Academic Integrity:

During tests, students should not use answers generated by other students. If I believe than an exam has been compromised, I reserve the right to have the suspected student to retake the exam. Furthermore, students will not be able to use a cell phone in class during exams. Please turn off all cell phones and keep them out of sight.

Participation:

I encourage students to work problems along with other students during the class sessions. If you do not understand the problem or methodology used, feel free to raise your hand and ask questions. Try to avoid talking during the lecture so that all students can hear what is being said.
Extra Credit:

There is no extra credit offered in this course. Your final grade will be computed based on your work as previously described in this syllabus.

Exams:

Each of the 3 exams will have multiple choice questions and possibly numerical problems. Students will be expected to make up any exams missed because of personal illness or emergency. All students will be required to take the final exam.

Plus or Minus Grades

I do not plan to use plus or minus grades for the overall grades in this course.

Course Outline

M Aug 27 Orientation
W Aug 29 Chapter 1 Financial Planning Process
F Aug 31 Chapter 1 Financial Planning Process
M Sep 3 Labor Day
W Sep 5 Chapter 2 Financial Statements and Budgets
F Sep 7 Chapter 2 Financial Statements and Budgets
M Sep 10 Chapter 3 Taxes
W Sep 12 Chapter 3 Taxes
F Sep 14 Chapter 3 Taxes
M Sep 17 Chapter 4 Managing Cash and Savings
W Sep 19 Chapter 4 Managing Cash and Savings
F Sep 21 TBA
M Sep 24 Chapter 4 Managing Cash and Savings
W Sep 26 Chapter 5 Automobile and Housing Decisions
F Sep 28 Chapter 5 Automobile and Housing Decisions
M Oct 1 Chapter 5 Automobile and Housing Decisions
W Oct 3 Review for Test 1
F Oct 5 Test 1 (Chapters 1-5)
M Oct 8 Chapter 6 Using Credit
W Oct 10 Chapter 6 Using Credit
F Oct 12 Chapter 6 Using Credit
M Oct 15 Fall Break
W Oct 17 Chapter 8 Life Insurance
F Oct 19 Chapter 8 Life Insurance

M Oct 22 Chapter 9 Health Insurance
W Oct 24 Chapter 9 Health Insurance
F Oct. 26 Chapter 9 Health Insurance
M Oct 29 Chapter 10 Property Insurance
W Oct 31 Chapter 10 Property Insurance
F Nov 2 Review for Test 2

M Nov 5 Test 2 (Chapters 6, 8-10)
W Nov 7 Chapter 11 Investment Planning
F Nov 9 Chapter 11 Investment Planning
M Nov 12 Chapter 12 Investing in Stocks and Bonds
W Nov 14 Chapter 12 Investing in Stocks and Bonds
F Nov 16 Chapter 13 Investing in Funds and Real Estate

M Nov 19 Chapter 13 Investing in Funds and Real Estate
W Nov 21 Thanksgiving Break
F Nov 23 Thanksgiving Break
M Nov 26 Chapter 14 Planning for Retirement
W Nov 28 Chapter 14 Planning for Retirement
F Nov 30 Chapter 15 Estate Planning

M Dec 3 Chapter 15 Estate Planning
W Dec 5 Review for Final
W Dec 12 10 am Final Exam (Chapters 11-15)